Statement of Work

1. TITLE

Employee Assistance Program (EAP) – Professional counseling and consultation Services – (**user note:** indicate name of site/region where services to be delivered)

2. BACKGROUND

The Canada Revenue Agency (CRA) recognises the value and importance of promoting, fostering and maintaining the well-being of its employees and their families. It recognises that their health and well-being can be affected by personal or work-related issues which, if not resolved, may have a negative impact on work performance. It also supports a prevention/education approach to create and sustain a healthy work environment. **In order to create and maintain employee and organisational health, the CRA provides EAP services through a variety of access points internal and external to the CRA. This SOW deals with the external component only.**

3. OBJECTIVE

The CRA, with the participation of the union organisations, is committed to making available a confidential and voluntary EAP, without prejudice to job security or career progression, to employees who may be experiencing personal, health or work-related issues. The purpose of this program is therefore to provide a variety of services. These include:

- Professional qualified assistance to the employees and their families when required, to assess the nature of the issue(s) presented, provide short-term counselling when appropriate, and make referrals to the most appropriate source of help;
- Professional consultation/advisory services to managers, supervisors and union representatives;
- Information and educational sessions on issues related to individual and organisational well-being.

EAP services provided under this contract are <u>not</u> intended to replace community-counselling services or resources that are available.

4. SCOPE

Definitions

For the purpose of this requirement:

a) **<u>Employee</u>:** All persons currently employed by the Canada Revenue Agency in an indeterminate or determinate position, including students and employees who are hired on a part-time basis. **Contractor-consultants are not considered employees.**

b) **<u>Employee Diversity</u>:** The diversity of employees is expressed by the individuality or uniqueness of people who differ in work and cultural backgrounds, experience, education, age, gender, race, ethnic origin, sexual orientation, religion, physical abilities, and all other ways in which we differ.

c) **<u>Family</u>:** An employee's spouse (or common-law spouse residing with the employee), dependent children (including foster children or children of legal or common-law spouse), or any relative permanently residing in the employee's household or with whom the employee permanently resides and who is financially dependent on the employee.

d) **<u>Client</u>:** CRA employees and their family members are considered potential clients.

e) **<u>Case</u>:** A case refers to counselling services only. A case is a documented record of the session(s) where, through direct contact between the EAP counsellor and an eligible client or clients - if they are consulting together on common issues - it must include an assessment, a plan of action (including the provision of short-term counselling and/or referrals), and a follow-up.

The following are **not** to be considered cases, and <u>will be tracked separately:</u>

a. Clients who call for information or call requiring referral services only would not be counted as a case.

b. Professional Consultation/Advisory services provided to managers, supervisors and union representatives should not be counted as cases.

f) **<u>Session:</u>** A session involves direct contact between the client and the professional counsellor, engaged in back and forth conversation, where both parties work collaboratively to resolve identified issues and concerns.

g) **<u>CISM Definitions:</u>**

I. Training

i. <u>Basic or Level 1 type course</u>: This training is called basic, level 1 or other similar name. It presents the core elements of a comprehensive, systematic and multi-component crisis intervention curriculum. Its purpose is to prepare the participants to know the wide range of crisis intervention services. Fundamentals of Critical Incident Stress Management (CISM) outline and participants can gain the knowledge and tools to provide several group crisis interventions, specifically demobilizations, defusing and the Critical Incident Stress Debriefing (CISD). The need for appropriate follow-up services and referrals when necessary would be included. Training is approximately 14 hours in duration.

ii. <u>Advanced or Level 2 type course</u>: This training follows the basic or level 1 CISM training and may be called advanced, level 2, or a similar name depending on the training organization. It reviews the core elements of a comprehensive, systematic and multi-component crisis intervention curriculum, but its main focus is on managing complex or enhanced group oriented crisis interventions. These may include, but are not limited to, significantly delayed or multiple incident CISD, suicide of a colleague or small group crisis support sessions after a disaster. Training may also include strategic intervention planning and multi-component CISM. Training would be approximately 14 hours in duration.

II. **<u>Debriefing Session:</u> A debriefing session is a seven-phase structured group discussion for small groups occurring usually within one to ten days after a critical event. It is conducted by a trained mental health professional (EAP coordinator-counsellor, external service provider, or other consultant), often with the assistance of trained peers. Its aim is to facilitate closure, mitigate symptoms and triage individuals who may need further support.**

III. **<u>Defusing Session</u>: A defusing session is a three-phase structured small group discussion held within hours of a critical event. Its aim is to assess, triage, mitigate acute symptoms, assess need for follow-up and, when possible, provide psychological closure. It is conducted by a trained mental health professional (EAP coordinator-counsellor, external service provider, or other consultant), often with the assistance of trained peers. Its aim is to facilitate closure, mitigate symptoms and triage individuals who may need further support.**

h) **<u>Counselling Services</u>:** The model to be used is to include an assessment, including a risk assessment, short-term counselling when appropriate, referral to longer term or specialised community resources, and follow-up. Short-term counselling should only be undertaken when some resolution to the issue can be arrived at within the limits of a short-term counselling model.

i) **<u>CRA Case Model 3.5 hour average model:</u>** The average number of hours for all cases <u>should not exceed 3.5 hours</u>**. The Contractor will provide clinical supervision to its counsellors to ensure the CRA model is fully understood and explained to clients. The Contractor will ensure that counsellors providing services to employees are those who have been identified in the proposal as being trained in solution-focused brief therapy modalities. At no time will the number of hours for one case exceed 5 hours without obtaining the prior written approval from the Project Authority. Approval will only be granted to the clinical supervisor upon demonstration of a thorough assessment and a plan to refer the employee to the appropriate community resource. Cases where approval has been granted shall be excluded from the 3.5 hour average calculation.**

j) **<u>Professional counsellor qualifications</u>:** A qualified counsellor with a Master's degree in Social Work, Psychology, or related fields (with a minimum 3 years' experience providing EAP or related clinical counselling services within the last 10 years). The CRA will accept and recognise any foreign educational credentials as long as they are considered acceptable by at least one of the following: an accredited, degree-granting Canadian educational institution, the International Credential Assessment Service of Canada (or similar and equivalent organisation), **or** an equivalency assessment process done by the provincially regulated professional association of which the professional counsellor is a current member. Professional counsellors must maintain current membership in EAP-related or clinical counselling professional organisation.

In addition to these requirements, those of the Contractor's professional counsellors who may be providing e-counselling services must have a minimum of twenty (20) hours of e-counselling training, OR a certification or diploma in e-counselling. Should the Contractor retain new counsellors, they must meet the above requirements to provide services to the CRA.

k) **<u>Intake services resources qualifications:</u>** <u>Intake services resources</u> must have a Bachelor's degree or diploma in Social Work, Psychology, or related fields, with a minimum of 1 year experience in EAP or related intake work, or a Master's degree in Social Work, Psychology, or related fields, and a minimum of 1 year experience in EAP or related intake work. The CRA will accept and recognise any foreign educational credentials as long as they are considered acceptable by at least one of the following: an accredited, degree-granting Canadian educational institution, the International Credential Assessment

Service of Canada (or similar and equivalent organisation), **or** an equivalency assessment process done by the provincially regulated professional association of which the intake services resource is a current member.

Should the Contractor retain new intake services resources, they must meet the above requirements to provide services to the CRA.

l) **<u>Professional Consultation and Advisory Services</u>:** are professional EAP consultation services to managers, human resources professionals and union representatives. They are meant to assist them in helping employees deal with personal or work-related issues that may be affecting their work performance and well-being.

m) **<u>Intake Services</u>:** Services provided to employees and members of their family requesting an appointment. These services include, but are not limited to: gathering of client contact information and client area of concern, explanation of parameters of the counselling services under the CRA contract, booking of appointment, process to ensure 24 hour call-back for booking of appointment, creation of client files, provision of referrals and risk assessment, as appropriate. Intake services can be performed by either intake services resources or professional counsellors.

n) **<u>Referral:</u>** Process whereby the Contractor sends or transfers clients to outside/community resources or to other internal CRA resources (e.g. coordinator-counsellor, human resources advisor, informal conflict resolution practitioner, union).

o) **<u>Self-referral:</u>** Process used in rare instances by which clients requiring long-term counselling services are retained by the Contractor for counselling outside of this requirement. **Only to be used with prior approval of designated Project Authority. This is not recognised by the CRA as a preferred practice.**

p) **<u>Project Authority:</u>** The EAP coordinator-counsellors for the region have the functional responsibility for the services delivered under this contract and will be the Project authorities. **Please refer to Section 7.8.2 of the contract for complete details.**

q) **<u>Record:</u>** All documentation pertaining to services rendered by the Contractor for the CRA.

r) **<u>File:</u>** Any documentation pertaining to Client Case Files whether they include clients' personal identifying information or not.

5. POPULATION COVERED

Population of CRA XXXX Region **varies from approximately XXXX to XXXX** employees as per seasonal fluctuations. See the chart below.

LOCATION	NUMBER OF EMPLOYEES
Office Address	XXX employees

6. LANGUAGE:

(user note: please select option 1, 2 or 3 according to your region)

<u>Option 1</u>
All services provided by the Contractor must be provided in both official languages (English and French). The Contractor must be able to provide sign language interpretation for the deaf and hard of hearing.

Or

<u>Option 2:</u>
The primary language utilized within the region is English. However, on rare occasions, the need to provide these services in French may be required. The 24-hour toll-free number 365 days per year, manned by a Professional counsellor(s), for crisis intervention counselling will always be available in both official languages. The Contractor must be able to provide sign language interpretation for the deaf and hard of hearing.

Or

<u>Option 3:</u>
The primary language utilized within the region is French. However, on rare occasions, the need to provide these services in English may be required. The 24-hour toll-free number 365 days per year, manned by a Professional counsellor(s), for crisis intervention counselling will always be available in both official languages. The Contractor must be able to provide sign language interpretation for the deaf and hard of hearing.

7. LOCATION

For all XXXX Region Offices:

(user note: please select option 1 or 2 according to your region. Do not use option 2 as a mandatory criteria if this contract is for a site where no municipal public transportation exists).

Option 1:

Services provided at off-site locations must be within one hour of any employee's workplace, accessible by private vehicle.

Or

Option 2:

Services provided at off-site locations must be within one hour of any employee's workplace, accessible by private vehicle **and municipal public transportation.**

Services provided at off-site locations must be within one hour of any employee's workplace, accessible by private vehicle **and municipal public transportation.**

8. CONFIDENTIALITY

Confidentiality of information is vital to the effectiveness of the Employee Assistance Program. Information shared with the EAP counsellor is of a confidential nature and, as such, will never be recorded on an employee's personnel record or be made available to management or union representatives. No information will be released to anyone without prior written and informed consent of the employee/family member who sought assistance, except in the following circumstances:

- In situations where the counsellor becomes aware of suspected child abuse;
- In cases where a life is threatened or there is serious threat of violence or injury to a third party; or,
- In any other case where disclosure of such information is required by law (e.g. court subpoena).

9. RECORD CONTENT, MANAGEMENT, RETENTION, AUDIT AND DISPOSAL

a) All **records**, such as but not limited to reports, monitoring, statistics, training, excluding Client Case Files, are to be kept for five (5) years.

b) The following clauses are applicable to all Client Case Files:

i) **Privacy Act:**

All personal information collected for EAP purposes under this contract is deemed to be under the control of the Agency and is consequently subject to the *Privacy Act,* http://laws-lois.justice.gc.ca/eng/acts/P-21/index.html and the Canada Revenue Agency's Security policy which can be viewed on the Government Electronic Tendering Service, provided by MERX™, Internet address: http://www.merx.com/ (under Government Resources).

ii) **Personnel Restrictions:**

Access to EAP Client Case Files are to be controlled and limited to only authorised personnel who have a job-related need-to-know and a Reliability Status granted by the Canada Revenue Agency or Public Works and Government Services Canada.

iii) **Client Case File Content/Restrictions:**

Client Case Files must not contain any personal identifying information. Any identifying information is to be kept separate and cross-referenced in a separate document. The Contractor must not record personal information relating to a third party in a Client Case File. Client Case Files will include dates, the general nature of problems, progress notes, recommended referrals and non-medical reports related to a client's work capability or limitations. Client Case Files should be stored in a secure, locked cabinet or safe.

iv) **Marking:**

EAP Client Case Files shall be designated sensitive and marked as PROTECTED-EAP.

v) **Retention:**

Retention of EAP Client Case Files must be done in accordance with Canada Revenue Agency's retention and disposal standard which is two (2) years after the date of the client's most recent contact with EAP. Files can, however, be kept longer according to the standards of the professional association to which the counsellor belongs, to the *Privacy Act* that states operational requirements of each Department/Agency (Department of Justice Canada, 1985), or the accreditation organisation of the service provider.

vi) **Audit:**

The CRA has the right to perform an audit of the Contractor's clinical Client Case Files. The CRA reserves the right to review the Contractor's clinical Client Case Files to ensure the Contractor is compliant with the standards detailed in **Section 9 RECORD CONTENT, MANAGEMENT, RETENTION, AUDIT AND DISPOSAL** of this Statement of Work.

vii) **Disposal:**

EAP Client Case Files must be destroyed two (2) years after the date of the client's most recent contact with EAP. These files are to be destroyed by commercially available strip shredders (maximum 10 mm width). Files can, however, be kept longer according to the standards of the professional association to which the counsellor belongs, to the *Privacy Act* that states operational requirements of each Department/Agency (Department of Justice Canada, 1985), or the accreditation organisation of the service provider. However, EAP client files may be destroyed earlier if requested by the client or with the client's consent.

viii) **Electronic files:**

If electronic files are kept, it is essential that standardised procedures be established to ensure that files can be readily accessed or retrieved, that back-up files exist and that the strict requirements of retaining hand written files continue to be followed. Provision also must exist within the computer system for a print-out of the file. Computer discs must be stored in a locked container.

10. SECURITY REQUIREMENTS

The Contractor must respect security provisions as identified in Section **7.7** of the Contract as well as the Security Requirements Check List (SRCL) and its attachment(s) found at Annex C.

Security clearance must be in place before counselling of CRA employees occurs. Security clearance must be granted for all intake and counselling resources prior to delivery of services under the contract.

Staff from the CRA's Security and Internal Affairs Directorate may visit the Contractor's site(s) to verify the security requirements are met.

11. SERVICES

a) The EAP services to be provided by the Contractor are the following:

- Intake Services
- Counselling Services
- Crisis Intervention Counselling
- Professional Consultation / Advisory Services
- Critical Incident Stress Management
- Promotion, Information and Educational Sessions

- Program Monitoring and Quality Control Services

b) Subcontracting of services is permissible in accordance within industry standards and must comply with the section entitled “Subcontracts’ in the General Conditions – Higher Complexity – Services.

c) The counsellor shall only undertake counselling with a client when some resolution to the issue can be arrived at within the limits of short-term counselling. If short-term counselling is not appropriate, referral to the appropriate resources should be made immediately after assessment.

d) Cases are counted as “new cases” only once per fiscal year, regardless of how often the client is seen. However, if the same client contacts the EAP later in the same fiscal year about an issue unrelated to the issue discussed the first time, the client would be considered as a new case.

e) The Contractor must provide access to its services to persons with disabilities (e.g. offices must be wheelchair accessible; the Contractor must have a toll-free text telephone (TTY) for persons with hearing disabilities).

f) The Contractor shall further undertake to provide, in an expedient manner (within ten (10) business days), an alternative counsellor, should the assigned counsellor become unavailable.

g) Wherever possible, counsellors of each gender and counsellors representative of the diverse CRA population are to be made available.

h) The Contractor must maintain contacts with, and have established an inventory of, community resources, support agencies and service providers in a variety of EAP-related fields (addiction counsellors, group therapists, social workers, psychologists, etc.) in order to refer clients for longer-term counselling services as needed. The Contractor must also maintain contact information for regional emergency services and this information must be available to all of the Contractor’s resources and counsellors.

i) The Contractor will **not** retain clients (self-referral) **except** on rare occasions where the counsellor is the only available resource in the area or there is no equivalent resource available to provide the specialised treatment required. All situations where the counsellor believes self-referral would be in the best interest of the client must be discussed with the **Agency’s Project Authority for approval, prior to delivery of counselling. The Contractor is expected to demonstrate they have explored potential community resources and that there is no other resource available. This must include mention of the psychological services coverage available to CRA employees under the Public Service Health Care Plan benefits.**

j) The Contractor shall provide services to the CRA’s diverse employee population. By diverse population it is meant the individuality or uniqueness of people who differ in work and cultural backgrounds, experience, education, age, gender, race, ethnic origin, sexual orientation, religion, physical abilities, and all other ways in which we differ.

k) There **will be no fee** for cancellations provided with a minimum of 24-hours’ notice.

l) General enquiries about the services described herein in this contract will be responded to at no charge, regardless of which of the Contractor’s resources or counsellors responds to the enquiries.

m) In the event of the end of the contract with the CRA, the Contractor will continue to provide the services defined in this Statement of Work only to CRA employees in the above-mentioned location(s) who have already started a counselling process with one of the Contractor’s counsellors until such time as the counselling process is completed.

12. TASKS

The Contractor shall provide **intake services for tasks B through F of this Section 12 only.** Intake services may be performed by either an intake services resource or a professional counsellor. As per definitions in sections 4k) and 4m) of this document. Intake services tasks include, but are not limited to:

A. <u>Intake Services</u>:

- Document employee or family member's contact information, **the employee status, their worksite and area of residence**, ensuring the employee is currently employed by the CRA.
- Obtain emergency contact information from the client prior to proceeding with further with the intake service.
- Gather information on the area of concern for the employee or family member.
- Perform a risk assessment, as appropriate.
- Calls requiring immediate intervention will be transferred directly and without interruption to a professional counsellor, such as in cases of critical incident or crisis situations. These calls will be considered counselling cases as soon as there is direct contact between the client and a professional counsellor.
- Provide information about **the short-term counselling services available under this** contract, including, but not limited to: number of **hours** available on average in a short-term counselling model (3.5 hours), cancellation and no show policies.
- Book appointment with a counsellor with the expertise and/or interest related to the area of concern (the next available appointment that fits within the schedule of the employee or family member will be given).
- In cases where an appointment cannot be booked at the time of the call, provide call back within **24** hours and offer an appointment time within ten (10) business days.
- Create Client Case Files.
- Provide information and referrals to other resources, as appropriate.

B. <u>Counselling Services</u>

The Contractor shall provide counselling services delivered by professional counsellors. The parameters of these services include but are not limited to:

a) Off-site counselling services outside the CRA's facilities at a suitable time and location. The first counselling session should occur within ten (10) business days of the client contacting the Contractor unless unforeseen circumstances arise.

b) If a client reaches a counsellor without first reaching intake (e.g. crisis situation or e-counselling), the counsellor must obtain emergency contact information from the client prior to proceeding further.

c) All service locations must have an inclusive and professional environment with a sound-proofed private office not open to public view.

d) Counselling services will be available Monday to Friday except for statutory holidays.

e) Counselling services will be made available within the core business hours of **7:00 AM to 17:00 PM** local time.

f) Evening hour sessions will be made available to all employees and eligible family members upon request.

g) A schedule of counsellor availability will be made known to Intake Services at least three (3) weeks in advance.

h) Scheduling of appointments will be arranged between the employee and the Contractor via Intake Services.

i) **Face-to-face counselling** involves direct contact between the client and the professional counsellor, engaged in back and forth conversation, where both parties work collaboratively to resolve identified issues and concerns. Face-to-face counselling is the preferred method of delivery for counselling services.

j) **E-counselling** is not appropriate for all types of situations and should only be presented to the client as an option and not as a recommendation, ensuring the choice remains with the client. The Contractor will avoid targeted promotional campaigns for e-counselling services. Prior to proceeding with e-counselling:

   i. the clients must be made aware that the confidentiality of information exchanged through e-counselling cannot be guaranteed.

   ii. the Contractor must ensure that the client provides consent, to engaging in e-counselling as a method of receiving counselling services. Consent can be obtained electronically by directing the client to the text of the consent and to click an agreement checkbox (or similar) and a submit button (or similar).

   iii. The Contractor must screen clients on the suitability of e-counselling for each client on a case-by-case basis. The screening process will include potential technological issues, language issues, keyboarding issues, presenting issues and clinical concerns. The screening process will be performed twice, once by the clients themselves through the Contractor's online portal through self-selection questions and then by the e-counsellor through the initial back-and-forth interaction. The screening process will assess the client for (but not limited to) risk of suicide, violence to or from others, or significant symptoms of a mental illness. Clients determined not to be suitable for e-counselling will immediately be re-directed to intake services. If the situation is a crisis, the client will immediately be re-directed to crisis intervention counselling.

E-counselling will not be done through regular e-mail but through a secure web portal on which the client has registered based on the Contractor's instructions. Exchange of correspondence will be accomplished through this portal either via a live chat or via messages being left in the portal for later reading. The client must login to the portal to retrieve their message(s). The message(s) must only be accessible by the client for whom they are intended; no other individuals can access and see the exchange of information.

k) **Telephone counselling** should not be used as a standard process but rather only in exceptional instances where it is absolutely required.

l) **E-mailing clients** should not be used as a standard process but only under exceptional circumstances where it is absolutely required. If a client contacts a counsellor using their work e-mail, the client must be made aware that the confidentiality of an e-mail exchange cannot be guaranteed and that all content shared by e-mail is not confidential and is the property of the Canada Revenue Agency

C. <u>Crisis Intervention Counselling</u>

The Contractor shall provide access to professional counsellors for crisis intervention counselling 24 hours per day, 365 days per year, through the toll free telephone number. If clients reach the intake counsellor, who recognizes the call as requiring immediate intervention, the call will be transferred directly and without interruption to a professional counsellor. If clients reach an after-hours voice automated system, they must be able to be connected directly with a professional counsellor within one button push. A recorded message with call back is not acceptable.

The professional counsellor shall conduct a risk assessment to determine the potential for harm to self or others. The Contractor shall provide the appropriate level of intervention based on the Contractor's protocol for handling clients in crisis; including but not limited to suicidal and or homicidal clients.

If a call is routed to the crisis intervention counsellor (either by intake or directly by the client through a button push), but upon contact with the counsellor it is determined that it is not a crisis intervention situation, the counsellor will perform the following, depending on the situation:

a) Client connected to the crisis intervention counsellor by mistake:

- advise the client to call the intake services during working hours and provide the telephone number to schedule an appointment. Such calls will be treated as calls for information, reported in the statistics report as such, and shall be at no charge to the CRA; or

b) Client connected to the crisis intervention counsellor because client is unable to connect with intake services during intake hours, and requires an appointment (e.g. privacy concerns during workday):

- perform the intake service for the client, report in the statistics report as such, and charge the CRA for an intake service.

D. Professional Consultation/Advisory Services

The Contractor shall provide professional consultation services to managers and union representatives to assist them in helping employees deal with personal, health or work-related issues that may be affecting an employee's work performance and well-being.

E. Critical Incident Stress Management (CISM)

The CRA EAP defines a critical incident as any situation outside the range of normal experience that causes unusually strong emotional or physical reactions that could interfere with one's ability to function either at the scene or later. Examples of critical incidents could include natural disasters, assaults or accidents, experiences of death and loss, and witnessing tragedy.

a) The Contractor shall provide consultation related to critical incidents and where necessary, defusing and debriefing sessions.

b) The types of incidents that would require a debriefing would include, but are not limited to: line of duty death; suicide or homicide; armed or violent assault in the workplace; hostage-taking; disaster or fatality in the workplace.

c) Other incidents may potentially require an intervention (e.g. injury or death of a co-worker outside the workplace; medical emergency, etc.).

d) CISM services shall be offered within 24 to 72 hours after a critical incident. It is the Contractor's responsibility to ensure availability of their staff to meet this requirement at all times.

F. Promotion, Information and Educational Sessions

The Contractor will participate in on-site promotion of the EAP in order to maintain a high level of visibility of the Program. This includes, but is not limited to:

a) Providing on-site EAP orientation sessions to employees upon request from the Project Authority or authorised representative.

b) Providing educational sessions related to issues of health and wellness of employees and managers (for example, sessions on grief, parenting, or stress management) upon request of the Project Authority or authorised representative request.

c) Co-delivering training sessions for union/management representatives (developed by the CRA) upon request of the Project Authority.

d) Assisting in the organisation of and participating in any Wellness Fair requested by the Project Authority or authorised representative during the life of the contract.

e) Producing a local, quarterly CRA EAP newsletter, only upon request from the Project Authority.

f) Providing each CRA location listed under Section 5 Population Covered, with promotional and information material, such as, but not limited to, brochures, wallet cards, fridge magnets, or other promotional items. The promotional and information material must at a minimum include the Contractor's telephone number(s) and TTY number(s). If the Contractor has separate telephone numbers for intake services and crisis intervention counselling, then this distinction must be clearly made on all promotional and information material, clearly advising the reader what each telephone number is for. The Contractor shall provide at least one (1) promotional item per employee per year.

g) Displaying all relevant EAP contact information on the Contractor's website.

G. <u>Program Monitoring and Quality Control Services</u>

a) The Contractor shall attend, upon request from the Project Authority, local EAP Advisory Committee meetings. These meetings usually occur on a quarterly basis at the locations which will be offered services under this contract as described in Section 5 of the Statement of Work.

b) The Contractor shall provide quarterly EAP statistics, in a format determined by the CRA (currently requiring the ability to use Microsoft Excel), including but not limited to the number of new cases, types of issues, hours of service delivered, promotional activities, etc. A copy of the CRA statistical form is included as Appendix A-1.

c) As part of the CRA's monitoring of the Contractor's EAP services for quality assurance, and service improvement purposes, the Contractor shall collect Client satisfaction data. Client satisfaction questionnaires are to be provided to every client receiving counselling services. In keeping with CRA and EAP industry standards, the client's participation is voluntary, the completed questionnaires will be kept confidential, and any reporting will be done in a manner that protects the anonymity and privacy of the client. The aggregated data will be provided in a Client Satisfaction Summary Report on an annual basis to the CRA. The data to be collected and reported will include, but not be limited to:

i. The total number of Client satisfaction questionnaires sent out and returned during a one-year period.

ii. Quantitative data measuring Client satisfaction related to the quality of service, both for Counselling and Intake Services.

iii. Quantitative data measuring Client satisfaction related to the effectiveness of Counselling Services.

iv. Qualitative data related to client's experience with the service provider (which may include intake, counselling, referral services).

v. Number and nature of incidents and complaints and their outcomes.

13. CONSTRAINTS

a) Travel expenses are to be borne by the Contractor as part of any resultant contract cost.

b) Record management, retention, audit and disposal:

All EAP records and counselling Client Case Files must be managed in the manner described in Section 9 – RECORD MANAGEMENT, RETENTION, AUDIT AND DISPOSAL.

c) All incidents and complaints will be reported immediately to the Project Authority.

d) The Contractor must be capable of providing adequate coverage in the event of a pandemic as defined by the Federal Government of Canada.

14. DELIVERABLES

a) Counselling Services, Intake Services, Crisis Intervention Counselling, Consultation/Advisory Services, Critical Incident Stress Management, Promotion, Information and Educational Sessions, Program Monitoring and Quality Control Services (Tasks A through G).

b) EAP Newsletter (Task F): Upon request by the Project Authority.

c) EAP Statistical Report (Task G): Quarterly. No later than six (6) weeks after the end of the each quarter. (The first quarter ends June 30th)

d) Client Satisfaction Summary Report (Task G): Yearly. No later than six (6) weeks after the end of the fourth quarter. (The fourth quarter ends March 31st.) The report must include the response rate of the Client satisfaction questionnaires, the roll-up of all the responses of clients and the compilation of the statistical data documented at intake.

APPENDIX A-1: EXTERNAL CONTRACTOR STATISTICS

Appendix A-1 Stats
report - E

APPENDIX A-2: DEFINITIONS FOR EXTERNAL CONTRACTOR STATISTICS

These definitions can also be found in the 'cell comments' attached to the corresponding cell on the External Services Provider Statistics Excel Sheet (as indicated by red corner markers in the right top corner of the cell). To view the comment, place the cursor over that cell.

Excel Spread sheets can be enlarged to facilitate viewing. On the main toolbar, at the top of the screen, select "view", select "zoom" and then select the desired level magnification and then "ok". Should you want to increase the magnification more than 200% select "custom" and type the desired level of magnification (e.g. 300 %).

Excel spread sheets only tabulate numerical data. Non-numerical data such as text is not a valid entry and prevents the spreadsheet from calculating data accurately. Please enter all non-numerical data in the 'Comments' section at the end of the document. For example, if in the counselling section under "issues: other" a client sought counselling for an issue other than the above mentioned issues in the first quarter, such as an unusual situation experienced at home, enter "1" beside "other" in the first quarter and specify the quarter and the type of issue in the 'comments' section. An entry such as "**1*" or "1 unusual**" would prevent excel from tabulating the result.

<u>GENERAL INQUIRIES</u>
Clients who contact you **for information only** would not be counted as a case, but would be tracked under "General Inquiries". Examples of general inquiries include general information relating to the program and how to access services, information on community services, and information on brown bag events such as "Lunch & Learns Sessions".

NEW CASES*
Cases are counted as "new cases" only once per fiscal year, regardless of how often the client is seen. However, if the same client contacts the EAP later in the same fiscal year about an issue unrelated to the issue discussed the first time, the client would be considered a new case. Advisory services provided to managers, union representatives and HR professionals should not be counted as cases and should be tracked under **Advisory Services**.

***Each new case should only show up once in one of the following categories:**

<u>Employees (Alone):</u> This category includes CRA employees who access the EAP on an individual basis.

<u>Employees & Family Member(s):</u> This category includes CRA employees who access the EAP with a family member for couples or family services. Even though there is more than one individual present, only one person (the employee) should be listed on the statistical form in this category and is considered a case.

<u>Family Member(s) (Without Employee):</u> This category includes CRA employee's family members who access the EAP on an individual basis or as a family when the employee is not present (for example the employee's spouse and their child). Even though there may be more than one individual present, **only one person should be listed** on the statistical form in this category. The counsellor should decide who the primary client would be, and list that person as the new case.

<u>Crisis Counselling</u>
This category includes the number of cases of an employee or family member connecting with a counsellor via telephone or in person **during a crisis situation**. You might or not open a file, but <u>issues</u> would be counted. This includes cases that need to be address immediately or within the same day. **This number will automatically be added into the total number of new cases, so should not be counted in the preceding categories.**

TOTAL NEW CASES
The total number of new cases includes the number of “Employees (alone)”, “Employees and family member(s)” and “Family member(s) (without the employee)” and the number of “Crisis Counselling”. This row will automatically calculate the total number of new cases.

MODE OF DELIVERY
This section indicates the mode of delivery used to offer counselling services for all new cases. The total number of this section should be the same as the cumulative numbers on the ‘Total New Cases’ line.

E-counselling:
Involves provision of professional counselling services through a secure and encrypted electronic technology (internet) mode of communication between the client and a professional counsellor, where both parties work collaboratively to resolve identified issues and concerns.

Face-to-face:
Involves direct contact between the client and the professional counsellor, engaged in back and forth conversation, where both parties work collaboratively to resolve identified issues and concerns.

Telephone counselling:
Involves counselling provided by telephone in exceptional circumstances where there is an urgent need for counselling and until the client can receive face-to-face counselling services.

CARRIED OVER CASES
Cases are counted as “new cases” only once per fiscal year, regardless of how often the client is seen. However, the end of the clients’ counselling sessions doesn’t necessarily coincide with the end of the quarter. Carried Over Cases are cases that were counted as a new case in a previous quarter and that are carried over to the current quarter.

TOTAL OPEN CASES
The total number of open cases includes the number of new cases and carried **over cases for a given quarter. This row will automatically calculate the total of open cases.**

TOTAL CLOSED CASES
Please indicate the total number of cases that were closed during each respective quarter**.**

AGE GROUP
This category includes different age groups to be captured when there is ‘**new cases’**. If there is more than one individual present, **only one person (the employee**) should be listed on the statistical form in this category.

COUNSELLING
This section captures statistical data on counselling sessions including “new cases” and “carried over cases”, as outlined in the number of interviews, the number of hours of interviews and the number of ‘no-shows’.

Number of Interviews:
List the total number of interviews with employees and/or family members, whether they are the first or subsequent interviews.

Number of Hours of Interviews:
Indicate here the total number of hours spent for the interviews held.

Number of ‘No-shows’:
‘No-shows” can be defined as missed counselling appointments for which the client did not notify the counsellor that they couldn’t make their appointment and subsequently does not show up.

Number of Cancellations:
Cancellations are defined as meetings that are cancelled with less than 24 hours notice of the appointment that was to take place.

REFERRED BY
List the type of referral source from which the **first** counselling visit emanated. This section should only be filled out for new cases. The total box should match the total new cases box.

Other:
List referrals that have come from sources other than those listed (e.g. family doctor, friend, and family member).

ISSUES
List the counselling issue under the appropriate heading. If there is more than one issue (e.g. alcohol and legal), **list all main issues. Issues are determined through assessment by the counsellor**.

Addiction – Substance:
Client requests services due to their substance addiction (e.g. drug, alcohol or other substance abuse). If the employee is requesting services regarding a family member's addiction, such as their spouse/partner or teenager, the issue should be listed under "family – relationships" and the type of addiction should be noted in the comments section.

Addiction – Gambling:
Client requests services due to their gambling addiction (e.g. slot machines, poker, online gambling, etc). If the employee is requesting services regarding a family member's addiction, such as their spouse/partner or teenager, the issue should be listed under "family – relationships" and the type of addiction should be noted in the comments section.

Addiction – Other:
Client requests services due to their behavioural addiction (e.g. excessive spending, sexual addictions, etc). If the employee is requesting services regarding a family member's addiction, such as their spouse/partner or teenager, the issue should be listed under "family – relationships" and the type of addiction should be noted in the comments section.

Family – Relationships:
Client requests services regarding his/her concerns about relationships with their spouse or partner, children, and/or extended family. For example, the client has a conflict with their spouse, their sister has recently been diagnosed with a life threatening illness, and the client's partner has an addiction problem.

Family – Children:
Client requests services regarding his/her children and/or his/her spouse's /partner's children.

Family – Elder:
Client requests services regarding an aging family member, such as his/her parent, in laws, or members of extended family.

Family – Violence:
Client requests services regarding violence occurring within their family. The violence could be physical, emotional, and/or verbal in nature. For example the client could be treating their spouse or partner violently or be the victim of verbal abuse from their teenage son or daughter. Clients may be the victim, perpetrator, or witness.

Family – Other:
In this section, list any other family related issues for which the client is seeking counselling services. Specify the type of family issue in the comments section.

Financial:
Client requests services for emotional support related to financial concerns.

Grief:
Client requests services for emotional support related to grief and bereavement issues.

Handling of Suicidal Calls:
Client requests services regarding his/her experience of handling a suicidal call at work.

Health – Emotional/Mental (self):
Client requests service regarding one's own emotional and mental well-being. Issues such as anger management, loneliness and mental illness are also included in this category.

Health – Emotional/Mental (others):
Client requests service regarding someone else's emotional and mental well-being. Issues such as anger management, loneliness and mental illness are also included in this category.

Health – Physical:
Client requests services regarding concerns focusing on physical well-being and physical health disorders, whether the employee has consulted a physician regarding his/her condition or not.

Legal:
Client requests services for emotional support related to concerns of a legal nature.

Relationships - Other:
Client requests services regarding his/her concerns about relationships other than with their family (spouse or partner, children, extended family) and/or work-related relationships. For example, the issue can occur in any type of relationship including friendship, neighbours, peer, community and/or social group.

Suicide- own thoughts:
Client requests services regarding own suicidal thoughts or behaviours.

Suicide- other person:
Client requests services regarding concerns for someone else (colleague, family, friend) who attempted suicide or who has suicidal thoughts or behaviours.

Suicide- grief:
Client requests services regarding someone in their life (colleague, family, friend) who died by suicide.

Work - Abuse, Threats, Stalking and Assaults against Employees:
Client requests services due to abuse, threats, stalking or assault directed at them or their property in the performance of their duties, or as a direct result of their duties as defined in the CRA's Finance and Administration Manual.

Work – Career Counselling:
Client requests services for emotional support regarding career decisions related issues.

Work – Change:
Client requests services regarding workplace change.

Work – Conflict (Peer):
Client requests services regarding a situation at work in which he/she is experiencing difficulty working with another colleague.

Work – Conflict (Supervisor):

Client requests services regarding a situation at work in which he/she is experiencing difficulty working with his/her supervisor.

Work - Harassment:
Client requests services due to the experience of perceived or actual harassment at work. Clients may be the victim, perpetrator, or witness.

Harassment is defined according to CRA as a form of misconduct / improper behaviour by an employee that is directed at and is offensive to another employee and which that person knew or ought reasonably to have known would be unwelcome and cause offense or harm. It comprises objectionable conduct, comment, or display that demeans, belittles, or causes personal humiliation or embarrassment, and any act(s) of intimidation or threat(s), which detrimentally affects individual well-being or the work environment.

Work - Retirement:
Client request services regarding the psychological and social aspects of retirement.

Work – Return to Work:
Client requests services regarding return to work issues, such as their need for accommodation measures.

Work – Stress:
Client requests services regarding work related stress.

Work – Workforce Adjustment:
Client requests services regarding the impacts of workforce adjustment, downsizing or restructuring situations.

Work – Workload:
Client requests services regarding difficulty in managing his/her current workload.

Work – Other:
In this section, list all other work-related issues for which the employee is seeking counselling services. Specify the type of work-related issue in the comments section.

Work/Life Balance:
Client requests services related to work/life balance. This is defined as a state of equilibrium between the responsibilities and pressures of work and those in other areas of life, such as family, friends and interests, which enable us to meet the time, energy, and commitment demands of both worlds.

Trauma:
Client requests services regarding an emotional shock following a stressful event.

Other:
List all other issues for which the employee or family member is seeking counselling services. Specify the type of issue in the comments section.

REFERRED TO

In this section, list all resources to which the client was referred.

Informal Conflict Resolution Network:
Record referrals to the National Conflict Resolution Office or to a Regional Informal Conflict Resolution Practitioner.

Community Services – Long Term Therapy:
This section includes referrals to long-term therapy provided by a counsellors, psychologist, psychiatrist, and specialized long-term treatment facility such as rehabilitation center for substance abuse. The type of community service should be specified in the comments section.

Community Services – Other:
Community Services include medical, financial, legal, support services, etc. The type of community service should be specified in the comments section.

Coordinator-counsellor:
A CRA employee who is a professional counsellor providing services of assessment, short-term counselling referral, and follow-up. They provide consulting and coaching services for managers dealing with workplace issues. They also provide consulting services to union representatives and the HR community. The Coordinator-counsellors are responsible for managing the program.

Human Resources:
This section refers to Human Resources services provided within the CRA.

Management:
Management refers to the employee's direct supervisor or manager or to another member of the management team.

Union:
This section refers to the employees designated union and union representatives.

Other:
List all other referrals suggested. Specify the type of referral in the comments section.

ADVISORY SERVICES (managers)
Advisory Services include sharing of information and identifying available resources and options for a given management issue. This may include providing advice, and/or helping an individual reflect on and analyze how they manage their team. This category also includes coaching services, which can be defined as a process encompassing guidance, support, and/or validation in relation to the manager's role and the direction in which he/she proceeds with various issues regarding an employee and/or their team.

This section breaks down the number of managers (including Team Leader, MG equivalents and EC's) who consulted with EAP, the numbers of consultations that were provided, and the number of hours of consultation sessions. As with a counselling case, count each manager only once for each case that they consult about. If a manager comes for a consultation regarding another case during this fiscal year, they would then be counted again.

# of Managers:
List the number of managers (including Team Leader, MG equivalents and EC's) who consulted with EAP for advisory services. Count each manager only once for each case that they consult about. If a manager comes for a consultation regarding another case during this fiscal year, they would then be counted again.

# of Consultations:
List the number of consultation sessions held with managers.

Hours of Consultations:
List the total number of hours of consultation with managers. Increments of 0.25 hours can be used to tabulate time spent in consultations.

'No-shows':
'No-shows" can be defined as missed appointments for which the client did not notify the counsellor that they couldn't make their appointment subsequently does not show up.

Cancellations:
Cancellations are defined as meetings that are cancelled with less than 24 hours notice of the appointment that was to take place.

ADVISORY SERVICES ISSUES (managers)
In this section, list the advisory service issue under the appropriate heading. If there is more than one issue (e.g. alcohol and legal), **list all main issues**.

Addictions:
Client requests services regarding an employee possibly having an addiction problem (e.g. alcohol or drugs, gambling or other).

Change:
Client requests services regarding good people practices relating to change.

Communication:
Client requests services on improving his/her communication skills or on improving communication within his/her team.

Conflict:
Client requests services regarding a situation at work in which he/she is experiencing difficulty working with an employee or a situation of interpersonal conflict within his team.

CISM:
Client requests services regarding Critical Incident Stress Management.

Disability/Return to Work:
Client requests services regarding issues related to an employee with a disability or regarding an employee's return to work following short or long term disability leave.

Family Related:
Client requests services regarding a family related issue that is affecting an employee's well-being or work performance (e.g. domestic abuse).

General Inquiries about EAP services:
Client requests information regarding EAP services and support. This category would be used when a manager or union rep. meets with the external service provider to get a better understanding of their role and responsibility regarding EAP services, of how to recommend EAP to their employees, as well as of the workshops that might or might not be suitable for their group.

Grief:
Client requests services regarding grief and bereavement issues that are affecting an employee or members of his/her team.

Harassment:
Client requests services regarding an employee's experience of perceived or actual harassment at work. Harassment is defined according to CRA as a form of misconduct/ improper behaviour by an employee that is directed at, and is offensive to, another employee and which that person knew or ought reasonably to have known would be unwelcome and cause offense or harm. It comprises objectionable conduct, comment or display that demeans, belittles or causes personal humiliation or embarrassment, and any act(s) of intimidation or threat(s), which detrimentally affects individual well-being or the work environment. This can also include the impact on a team of issues relating to perceived or actual harassment at work.

Mental Health:
Client requests service regarding an employee's emotional well-being or possible mental health issue. Issues such as anger management, loneliness and mental illness are also included in this category.

Performance Management:
Client requests services regarding how to deal with an employee's performance issues.

Stress (Self):
Client requests services regarding his/her stress level relating to their role.

Stress (Employee or Team):
Client requests services regarding an employee affected by excessive stress or high stress levels within his/her team.

Suicide- ee disclosure:
Client requests services regarding an employee's disclosure of suicidal ideations or an employee's suicidal behaviours.

Suicide- death:
Client requests services regarding the suicide of an employee that is affecting members of his/her team.

Work/Life Balance:
Client requests services regarding Work-Life Balance of employees. This can be defined as a state of equilibrium between the responsibilities and pressures of work and those in other areas of life, such as family, friends and interests. In concrete terms, Work-life balance is about adjusting working patterns. Employers are developing a wide range of work-life balance options, covering flexible working arrangements and flexible benefit packages. Examples include flextime, job-sharing, working from home, time off in lieu and breaks from work.

Workforce Adjustment:
Client requests services regarding the impact on employees of workforce adjustment, downsizing or restructuring situations.

Other:
In this section, list all other issues for which the manager is seeking advisory services. Specify the type of advisory service listed here in the comments section.

ADVISORY SERVICES (union rep.)
Advisory Services include sharing of information and identifying available resources and options for a given issue. This may include providing advice, and/or helping an individual reflect on and analyze how they provide assistance to employees. This category also includes coaching services, which can be defined as a process encompassing guidance, support and/or validation in relation to the union representative's role and the direction in which he/she proceeds with various issues regarding an employee.

This section breaks down the number of union representatives who consult with EAP, the number of consultations that were provided, and the number of hours of consultation sessions. As with a counselling case, count each union representative only once for each case that they consult about. If a union representative comes for a consultation regarding another case during this fiscal year, they would then be counted again.

# of Union Representatives
List the number of union representatives who consulted with EAP for advisory services. Count each union representative only once for each case that they consult about. If a union representative comes for a consultation regarding another case during this fiscal year, they would then be counted again.

# of Consultations:
List the number of consultation sessions held with union representatives.

Hours of Consultations:
List the total number of hours of consultation with union representatives. Increments of 0.25 hours can be used to tabulate time spent in consultations.

‘No-shows’:
‘No-shows” can be defined as missed appointments for which the client did not notify the counsellor that they couldn’t make their appointment and subsequently does not show up.

Cancellations:
Cancellations are defined as meetings that are cancelled with less than 24 hours notice of the appointment that was to take place.

ADVISORY SERVICES ISSUES (union rep.)
In this section, list the advisory service issue under the appropriate heading. If there is more than one issue (e.g. alcohol and legal), **list all main issues**.

Addictions:
Client requests services regarding an employee possibly having an addiction problem (e.g. alcohol or drugs, gambling or other).

Change:
Client requests services regarding good people practices relating to change.

Communication:
Client requests services on improving his/her communication skills or helping an employee improve his/her communication skills.

Conflict:
Client requests services regarding a situation at work in which he/she is experiencing difficulty working with an employee or a situation in which an employee is experiencing interpersonal conflict at work.

CISM:
Client requests services regarding Critical Incident Stress Management.

Disability/Return to Work:
Client requests services regarding issues related to an employee with a disability or regarding an employee’s return to work following short or long term disability leave.

Family Related:
Client requests services regarding a family related issue that is affecting an employee’s well-being or work performance (e.g. domestic abuse).

General Inquiries about EAP services:
Client requests information regarding EAP services and support. This category would be used when a manager or union rep. meets with the external service provider to get a better understanding of their role and responsibility regarding EAP services, of how to recommend EAP to their employees, as well as of the workshops that might or might not be suitable for their group.

Grief:
Client requests services regarding grief and bereavement issues that are affecting an employee.

Harassment:
Client requests services regarding an employee’s experience of perceived or actual harassment at work. Harassment is defined according to CRA as a form of misconduct / improper behaviour by an employee that is directed at and is offensive to another employee and which that person knew or ought reasonably to have known would be unwelcome and cause offense or harm. It comprises objectionable conduct, comment or display that demeans, belittles or causes personal humiliation or embarrassment, and any act(s) of intimidation or threat(s), which detrimentally affects individual well-being or the work environment.

Mental Health:

Client requests service regarding an employee's emotional well-being or possible mental health issue. Issues such as anger management, loneliness and mental illness are also included in this category.

Performance Management:
Client requests services regarding an employee's performance issues.

Stress (Self):
Client requests services regarding his/her stress levels relating to their role.

Stress (Employee):
Client requests services regarding an employee affected by excessive stress.

Suicide:
Client requests services regarding an employee disclosure of suicidal ideations.

Work/Life Balance:
Client requests services regarding Work-Life Balance of an employee. This can be defined as a state of equilibrium between the responsibilities and pressures of work and those in other areas of life, such as family, friends and interests. In concrete terms, Work-life balance is about adjusting working patterns. Employers are developing a wide range of work-life balance options, covering flexible working arrangements and flexible benefit packages. Examples include flextime, job-sharing, working from home, time off in lieu and breaks from work.

Workforce Adjustment:
Client requests services regarding the impact of workforce adjustment on an employee or when the employer downsizes or restructures its workforce.

Other:
In this section, list all other issues for which union representative is seeking advisory services. Specify the type of advisory service listed here in the comments section.

ADVISORY SERVICES (HR professionals)

Advisory Services include sharing of information and identifying available resources and options for a given issue. This may include providing advice, and/or helping an individual reflect on and analyze how they provide assistance to employees and managers. This category also includes coaching services, which can be defined as a process encompassing guidance, support and/or validation in relation to the HR professional's role and the direction in which he/she proceeds with various issues regarding an employee.

This section breaks down the number of Human Resources professionals who consulted with EAP, the number of consultation sessions provided, and the number of hours of consultation sessions provided. As with a counselling case, count each HR professional only once for each case that they consult about. If a HR professional comes for a consultation regarding another case during this fiscal year, they would then be counted again.

List the advisory service issue under the comments section of the appropriate quarter. If there is more than one issue (e.g. alcohol and legal), **list all main issues**.

# of HR Professionals
List the number of HR professionals who consulted EAP. Count each HR professional only once for each case that they consult about. If a HR professional comes for a consultation regarding another case during this fiscal year, they would then be counted again.

# of Consultations:
List the number of consultation sessions held with HR professionals.

<u># Hours of Consultations:</u>
List the total number of hours of consultation with HR professionals. Increments of 0.25 hours can be used to tabulate time spent in consultations.

<u>'No-shows':</u>
'No-shows" can be defined as missed appointments for which the client did not notify the counsellor that they couldn't make their appointment and subsequently does not show up.

<u>Cancellations:</u>
Cancellations are defined as meetings that are cancelled with less than 24 hours notice of the appointment that was to take place.

GRIEF AND LOSS

In this section, list the number of group sessions you held as a result of grief and loss, as opposed to clearly defined critical incidents, as well as the number of participants for each session. These sessions would include those offered in response to any experience of grief or loss that have affected a group of employees, and requires a group intervention.

<u># of Consultations</u>:
List the number of consultations that you had with managers to determine if the Grief and Loss session is an appropriate tool for their team.

<u># of sessions:</u>
List the number of Grief and Loss sessions was held with groups of managers or/and groups of employees. Also list the number of hours spent facilitating these sessions.

<u># of participants</u>:
List the number of employees and managers who were part of the Grief and Loss session.

<u>Total # Hours</u>:
This row will automatically calculate the total number of hours that the coordinator-counsellor spent facilitating the Grief and Loss session.

CRITICAL INCIDENT STRESS MANAGEMENT (CISM)

In this section, list the number of interventions that pertain to Critical Incident Stress Management. The CRA EAP defines a critical incident as any situation outside the range of normal experience that causes unusually strong emotional or physical reactions that could interfere with one's ability to function either at the scene or later. These events are usually outside the range of normal human experience on the job or in one's personal life and are often sudden and inconceivable. The following are examples of critical incidents: murder, suicide, sexual abuse, natural disaster and acts of terrorism and witnessing tragedy.

<u>Defusings (#):</u>
A defusing session is a three-phase structured small group discussion held within hours of a critical event. Its aim is to assess, triage, mitigate acute symptoms, assess need for follow-up and, when possible, provide psychological closure. It is conducted by a trained mental health professional (EAP coordinator-counsellor, external service provider, or other consultant), often with the assistance of trained peers. Its aim is to facilitate closure, mitigate symptoms and triage individuals who may need further support. List the number of defusings held as a result of a critical incident as well as the number of participants.

<u>Group Debriefings (#):</u>
A debriefing session is a structured group discussion for small groups occurring usually within one to ten days after a critical event. It is conducted by a trained mental health professional (EAP coordinator-counsellor, external service provider, or other consultant), often with the assistance of trained peers. Its aim

is to facilitate closure, mitigate symptoms and triage individuals who may need further support. List the number of group debriefings held as a result of critical incidents as well as the number of participants.

Individual Debriefings (#):
A debriefing session is a structured individual discussion occurring usually within one to ten days after a critical event. It is conducted by a trained mental health professional (EAP coordinator-counsellor, external service provider, or other consultant). Its aim is to facilitate closure, mitigate symptoms and triage individuals who may need further support. List the number of individual debriefings held as a result of critical incidents.

GROUP SERVICES / ACTIVITIES
In this section, list the number of group services or activities you held that were educational, awareness building or skills development focused, and that is not an Info session. These services or activities could include acting as Subject Matter Expert (SME) for panel discussions, arm chair discussions, unit meetings, coaching circles, ...

# of participants:
List the number of employees and managers who were part of the service or activity.

Total # Hours:
This row will automatically calculate the total number of hours that the counsellor spent facilitating the services or activities.

WORKSHOPS
Workshops are related to instructor-led training (ILT) and is led by an expert trainer and delivered in a group setting with the objective of building specific learner knowledge or skills.

- **Type/examples of content:**
  It is particularly effective for behavioural, interpersonal, communications skill development types of content.

- **Types of learning materials/ instructional methods/ discussion requirements**:
  It uses a wide variety of instructional methods including: lecture, reading, demonstration, question-answer, discussion, and discovery, sharing of best practices, exercises (problem-solving, practical exercises, case study, and role play).

- **Group size:**
  Groups of about 10-15 are optimal though ILT can be delivered in smaller or larger groups.

- **Feedback process**:
  Feedback is provided both by the leader and by other learners through discussion review of individual learning activities, observation and debriefing.

- **Measurement of results:**
  Measurement of the individual attainment of the learning objectives is included throughout the session and in the final exercises.

WORKSHOPS (employees)
List the number of workshops given to employees, and the total number of participants attending these sessions. If a manager requests a session for his/her team and then attends the session, consider the manager as an employee and count him/her as an “employee” participant.

Other:
List the topics of 'other' workshops under the Comments section at the end of the stats form.

<u>WORKSHOPS (managers & union representatives)</u>
List the number of workshops given to supervisors, managers and/or union representatives, and the total number of participants attending these sessions.

<u>Other:</u>
List the topics of 'other' workshops under the Comments section at the end of the stats form.

<u>LOCAL COMMITTEE MEETINGS</u>
Indicate the number of hours you spent attending local committees**.**

<u>PROMOTION</u>
In this section, list the promotional activity under the appropriate heading.

<u>EAP Orientation Sessions:</u>
In this section, list all EAP orientation sessions given to CRA employees. List the number of sessions and the total number of participants.

<u>EAP Booth:</u>
In this section, list the number of EAP booths set up at various events in which EAP related information was provided to CRA employees.

<u>EAP Booth (participants):</u>
To calculate the number of participants, use the total number of employees who access the booth. If this number is not available, use the total number of employees who would have had access to the event (e.g. number of employees at the worksite).

<u>Other EAP related info:</u>
In this section, list all other promotional activities given to CRA employees with EAP related information. Specify the type of promotional activity in the comments section.

<u>INFO SESSIONS</u>
List all preventative education or information sessions given to employees on EAP related subjects and the total number of employee's attending each type of session.

- Knowledge-based presentations, often called information sessions, are delivered by a subject matter expert and do not measure learning of the learners.

- The primary goal of the event is to provide or enrich knowledge and there is little or no opportunity to practice.

- **Type/examples of content**:
  Presentations usually provide information about change, eldercare, grief, health, mental health, parenting, resilience, retirement, stress, suicide or any other EAP related topics.

- **Types of learning materials/ instructional methods/ discussion requirements**:
  The principal method is lecture. It may be combined with other activities such as discussion, question and answer period.

- **Group size**:
  The group may range in size from very large (several hundred) to very small (five or six). Normally however, presentations are made to mid-sized groups (fewer than 50).

- **Feedback process:**

Learners are provided with explanation by the presenter but there is little or no interaction or feedback for individual learners, and individual practice during learning is very limited.

- **Measurement of results:**
  Monitoring and assessment of individual learning is not possible.

<u>Other:</u>
List the topics of 'other' information sessions under the Comments section at the end of the stats form.

<u>Comments:</u>
This section should be reserved for providing further information on activities listed in the statistical form only.

Ensure that you provide additional information about any box filled in on the stats form that is listed as 'other' (e.g. other issues, other referred by or to, other information sessions), and specify the appropriate quarter.